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Increasing complexity of duties and increasing needs for funds require college presidents to relinquish primary fund raising roles to college development offices and development officers. Development, a process which must involve the entire college community, consists of defining the educational philosophy of an institution and seeking funds to implement this philosophy. Educational philosophy and policy are the domain of the faculty, while the role of the development officer is to inspire and organize the raising of funds. The inspirational role is most important and consists of instilling in business men and the community a sympathetic understanding of and involvement in the goals and aspirations of the institution. (TT)

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THE DEVELOPMENT OFFICE

and

THE DEVELOPMENT OFFICER

A Presentation

to a

Workshop on Fund-Raising

of

THE COUNCIL FOR THE ADVANCEMENT OF SMALL COLLEGES

by

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## THE DEVELOPMENT OFFICE AND THE DEVELOPMENT OFFICER

The movement of colleges and universities from the quiet eddies into the swift waters which flow in the mainstream of American life is one of the most significant developments in American society over the past few years. From two million in 1950, college enrollments mushroomed spectacularly to six million in 1968. As Martin Meyerson put it, the college student has moved from being one of the "happy few" to one of the "frustrated many." This enormous increase in enrollments has forced many sweeping changes on institutions of higher learning.

The result is, that in higher education we find presently a certain "crisis mentality." Growing out of this mood we find two major revolutions in colleges and universities. One of these concerns program, curriculum, structure and the very relevance of the educational experience itself. This revolution is extremely important and interesting but it is not the focus of our concerns in this workshop. Our concerns today center in how institutions of higher learning have been forced by this crisis to seek new and more imaginative ways to fund themselves.

Time was, in the not too distant past, when the president did virtually all of the fund-raising for his institution. But this day is no more. The increasing complexity of his official business and the resultant extraordinary demands upon his time make impossible the simple life as described by Philander Chase, founder of Kenyon College:

"The King, the Queen, the lords, the earls,  
They gave their crowns, they gave their pearls,  
Until Philander had enough  
And hurried homeward with the stuff.

He built the college, built the dam,  
He milked the cow, he smoked the ham  
He taught the classes, rang the bell,  
And spanked the naughty freshmen well."

This concept of the presidency is now just a pleasant memory. While the president is still perhaps the college's most effective fund-raiser, Boards of Trustees, in the face of mounting costs, have more and more turned to a staff function and responsibility to cause money to be raised. Thus the development concept was conceived. Born in the fertile soil of economic imperative and rushed by necessity to a hasty but ill-defined maturity, college and university development is a profession in quest of itself. Long a neglected member of the academic hierarchy, college and university development as a profession is now coming into its own.

Saturday Review, in its December 16, 1967 issue, brought into sharp focus the growth of development:

"In the last ten years, as the resources and needs of higher education have multiplied, the process of securing new funds has developed into a specialized discipline so widespread that it now seems almost a conventional academic exercise. As an exercise, however, it is rigorous in the extreme. It is known as 'The Campaign.' Although colleges have conducted organized fund drives for more than half a century, the earlier efforts, run largely by amateurs on the basis of charity, pale beside the scope and intensity of The Campaign. The Campaign is run, not on the rhetoric of poverty, but by convincing prospective donors of the strength of the institution to which they are asked to give. To any of the thousands of persons who have taken part in the experience knows, The Campaign is no brief, peripheral fanfare of fund-raising techniques. Rather it represents for a college what one of its sociologists might call a major adaptive response of the whole institution."

This represents a sweeping change from the occasional fund-raising campaign which was prevalent only a few years ago.

Since college development is here to stay, it is important that we establish a literature and philosophy for the profession. For every profession or discipline must have a wellspring from which it draws sustenance. It is therefore important that we first establish a concept of development.

The following definition might well be our point of departure:

"It should be borne in mind that development is not just a statistical concept of inputs and outputs, nor a mechanical process that has only to be put into motion. It is a matter of organic growth--in essence the process of allowing and encouraging a college community to meet its own aspirations. It moves around a central pivot which is the collective college will. It involves basic changes in attitudes and values, adoptive of new habits of thought and promotion of new aptitudes."

The key word in this definition is "process" and this process must involve the entire college community.

As a concept, development is institution-wide. It requires a very close relationship with the academic and business division, especially the academic. Educational goals must be established, academic blueprints outlined, and ways of implementing policies thought through very carefully. The business operation of the institution is involved, as the wise conservation of resources and sound fiscal procedures are necessary to long-term growth and stability.

Generally, development is an effort on the part of the entire institution to analyze critically its educational philosophy, and program specific steps which must be taken to realize that philosophy.

It is important that all faculty and key administrative personnel understand the development concept, for if the institution is to reach its highest destiny, its major spokesmen must understand and be able to articulate its basic mission and philosophy.

Specifically, the development concept implies that the college must be prepared to generate and accept any gift of any kind which can help undergird its financial needs. The methods employed are many, but essentially it is the responsibility of development to create a "climate of acceptance" among the college's various constituencies. Hopefully, this "climate" will generate support, financial and otherwise, as will be necessary to move the institution along its chosen path. The methods used in creating this "climate" must be creative and aggressive, yet fitting and dignified. They must insure that every possible source is actively cultivated and that individuals and groups are shown how they can give to their advantage, through gifts of cash, stocks, property, wills, life annuities, life income contracts and other appropriate methods.

Once this concept is firmly established in your own mind, there are a number of important steps which must be taken to insure maximum effectiveness for your development office.

The first of these has to do with how the president and the Board perceives of the role of development. And here I would like to make a statement with which many of my colleagues in the development profession disagree. While development officers do solicit directly, technically their responsibility is much larger than this--it is to cause money to be raised by other people--by volunteers. Consequently, in

the strictest sense, development officers do not raise money, but rather they cause it to be raised. This is true because we know that money is raised by important people asking other important people who operate in their same sphere of influence to join in a cause which is dear to the both of them.

This is why it is so critically important that the president and Board and the development officer have a mutual understanding of what is expected of the development operation. Because the development operation at any college or university will be essentially what the president wants it to be, the first step for the development officer is to determine from the president what he expects. The development officer should explain to the president that development must be an institutional process, much broader than just an occasional fund-raising campaign. Moreover, he should encourage the president to have the Board adopt this concept. This is the very heart of the successful development operation. Without a clear understanding of the concept, no matter what is done next, the potential of a particular college is not being realized.

It would be difficult to overemphasize the importance of having the Board adopt this policy as the philosophy by which the development office will proceed. One thing is certain. The day the president or board member asks the development officer how much money he has raised that day, he can be sure he is operating on the wrong principle. I emphasize again the absolute necessity for getting this development concept understood and accepted by all members of the college community.

It is important that the faculty understand this. I find that faculty resentment to development efforts decrease in proportion to the amount of money raised which goes into faculty salaries. I would not be too optimistic about the faculty fully accepting and understanding the concept, but it is nonetheless important that they realize that your efforts are being spent on behalf of their families and professional careers.

Too, student leaders should be made aware of the true function of the development office. But by far the most critical relationship is the development office-president-board of trustees. This is the matrix out of which things happen.

Once this concept has been firmly established in the minds of the president and the Board, faculty and students, the next step is implementation.

So we arrive at the second important principle.

Development offices must operate on two very important, mutually dependent, mutually enriching concepts: Inspiration and Organization. It would be difficult to say which of these is more important. If I had to choose, I would take, "Inspiration." My reasons for this go deep into the basic laws of human nature. The most fundamental law is stated by the distinguished American psychologist, Gardner Murphy, who said:

"...the self comprises all the precious things and persons who are relevant to an individual's life, so that the term, selfish, loses its original connotations and the proposition that man is selfish resolves itself into the circular statement that people are concerned with the things they are concerned with."

"People are concerned with the things they are concerned with."  
This is disgustingly simple but speaks volumes to the development officer. Our responsibility is to inspire people to become concerned with our institutions. So the development office thrust must have an inspirational base related to the broader purposes of the institution for which the money is being raised. What we are really talking about in relating the rationale of a particular institution to a program of support is the "case." The "case" simply spells out the compelling reasons why this particular institution needs funds to carry out worthwhile programs .

Let us remember, that when we talk about colleges and universities and hospitals we are really talking about movements and men. And any successful movement depends upon the degree to which individuals will invest their time and talent and money and give priority to the movement's purposes over other competing pressures for loyalties. The future of many institutions, especially those which are private, may well rest with the institution's capacity to do this.

Dr. E. Bruce Heilman, a long time friend and President of Meredith College states:

"All through history the proper challenge has caused men and women to strive impatiently and restlessly for results which appear worthwhile to them. In the process, they have achieved great religious insights, created works of art, uncovered secrets of the universe, and established standards of conduct. In his book, Excellence, John Gardner has written, 'The best kept secret in America today is that people would rather work hard for something they believe in than enjoy a pampered idleness.' There are many able men who are looking for a cause to support, for worlds to conquer, for something to work toward...."

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When we examine a movement we must look at man and his motivations. It is easy in development to bog down in charts and mechanics and procedures. And make no mistake about it. A successful development operation cannot be built on sloppy organization and inefficient procedures. But first of all, people must come to believe in what the institution is trying to do. We are really dealing with a person's "will" more than his "intelligence." No less an observer of human behavior than Sigmund Freud made the following point:

"Students of human nature and philosophers have long taught us that we are mistaken in regarding our intelligence as an independent force and in overlooking its dependence upon the emotional life. Our intelligence, they tell us, can function reliably only when it is removed from the influences of strong emotional impulses. Otherwise, it behaves merely as an instrument of the will and delivers the inference which the will requires. Thus, in their view, logical arguments are impotent against affective interests, and that is why reasons, which, in Falstaff's phrase, are, 'as plenty as blackberries,' produce so few victories in the conflict with interests. Psychoanalytic experience has, if possible, further confirmed this statement."

Many other philosophers have addressed themselves to various motivating forces in people. Thomas Hobbes, for example, held that men were impelled by their passions and guided by their reason. Passion is the wind that fills the sails, reason the hand on the rudder. Robert Dial, in his perceptive little book, Modern Political Analysis, puts it another way: "Man is a chariot, pulled by the wild horses of passion and steered by reason." The point is clear and I repeat it for emphasis: The first principle of human motivation is that people work for causes which are dear to them, ones which reflect their emotions and philosophic values. We must, therefore, relate our institutions to people's value

systems. Major gifts are by-products of this relationship. But it is important to remember that inspiration and emotional involvement cannot exist in a vacuum. So once we have decided what the institution is trying to do, in over-simplified, almost Utopian terms, then we must make these goals manifest through people--through students, or professors, or key administrators or alumni. There are hundreds of stories to be told and a personal testimony from a student who has found meaning and purpose at your school is infinitely more important and significant than a thousand campaign brochures speaking in abstract terms. Letting a professor explain his research will have far more impact than saying, "we have a quality faculty." Again I repeat a point for emphasis. Goals and aspirations and emotional involvement can only be related to people. So it is important that once the development thrust has been pitched at an inspirational level, we make the development goals take on a sense of immediacy and relevancy through students, faculty and alumni.

Next, I want to emphasize that once this inspirational base has been established and people who are actually involved in the program are telling the story, the possibilities of success can be strengthened enormously by establishing a sound organization run by efficient procedures. Nothing will contribute to a successful development thrust like meetings that start on time, reports that are concise and brief, a strategic announcement of key gifts. And by the same token, no development program can succeed, no matter how inspirational the cause, if it is bogged down in poor organization. Poor organization is a sure-fire vaccination for low morale.

We have now established that development as a concept must be understood by the President, the Board, the Faculty and hopefully the students. Next we discussed the implementation of this concept through a combination of inspiration and organization.

Now let us turn to the development officer.

As important as the development officer is at a college, he must nonetheless realize that the heart of the college is its academic program and education is its main business. If we define education as the attempt to release the full, creative potential of every individual, then the role of the faculty assumes paramount importance. This is true because the faculty member is the official contact with the student, and consequently, he exerts more educational influence on him than any other member of the college community. This basic truth dictates that all activities, other than academic, be primarily supportive in nature. An acceptance of this role is prerequisite to become an effective development officer.

Frank Ashmore, vice president for institutional advance of Duke University, in speaking of the development officer, puts it this way:

"He is the servant of the faculty. The only reason for his position is to provide a better opportunity for the faculty to do its job...In the final analysis, the development officer should stay around only as long as he can be an enthusiastic and willing and believing and zealous servant of the institution, of its ideals and its faculty."

But in his primary role, the professor must have many dedicated people working in the background. Thus, an acceptance of this relationship with the faculty does not in any manner diminish the importance of the critically significant function which the development officer enjoys

in the total college community. Indeed, the future of many institutions, especially those which are private, may well rest with the ability of the development officer to bring the tragic consequences of its plight to a seemingly unconcerned public. Ponder, for example, the somber tone of the following quote from Public Concepts of the Values and Costs of Higher Education:

"It is obvious that within the next few years the contributions of the traditional sources of support...will prove to be deficient. Regardless of which projection of future enrollments one employs there will be a substantial gap by 1970 between required expenditures and expected financial support...Considering the anticipated future demands for higher education...there will not be enough money available by 1970-71 and particularly by 1975-76, to maintain the current standards of quality higher education while educating the greatly augmented number of new college applicants. To overcome this deficit the nation must either curtail the quality or quantity of its program of higher education, greatly increase the contributions from the traditional sources of support, or make some radical change in the current method of financing higher education."

So, while the faculty's role in determining the quality and effectiveness of the academic program is unquestioned, it remains to the development officer to generate sufficient money whereby this quality can be maintained and enhanced in a manner befitting its dignity. The amounts required for quality higher education will be great indeed, and at this point, Sidney G. Tickton, of the Academy for Educational Development and a perceptive observer of educational trends, asks a pertinent question: "Can the country afford such expenditures for higher education?...The answer is clear, he continues, "certainly the country can--if its people are willing to allocate the additional dollars that will be

required...Financing higher education is, therefore, a problem of policy, not of resources."

In view of this, the development officer's prime responsibility, in its broadest sense, is to influence favorably public policy and attitudes toward higher education. Only by knowing his own particular college in depth and being committed to its purposes can the development officer fulfill this task and thus help the president and board of trustees turn past experience into foresight and thereby permit the college to be the creator of its future and not a slave to its past.

More than any other member of the college community, the development officer interprets the college and its purposes to the business community and general public. What a delightful and relatively easy task this would be if the general public had a basic understanding of the workings and importance of higher education. But unfortunately it does not. For as former U.S. Commissioner of Education, Francis Keppel states: "We overestimate the public awareness of the aims and problems of higher education." James B. Conant agrees: "The average American gives little attention to what goes on in schools and colleges outside his immediate sphere of interest."

This general lack of understanding makes the development officer's task considerably more difficult but it does not remove the necessity for continuing to interpret the importance of higher education--and interpret it in an articulate, convincing and interesting manner. In dealing with the general public on the importance of higher education, the development officer should view himself less as a "salesman," more

as an "educational entrepreneur or statesman," less as "moving a product," more as developing in people with whom he comes in contact an understanding of the decisive role which education plays in maintaining a free society. This requires that he, first of all, have a deep commitment to the importance of higher education, and more specifically, know how it is related to the future welfare of the local community, state and nation.

Besides this key qualification, the development officer should:

- 1) know the unique characteristics of his own particular college and be able to explain these in a simple and interesting manner. He should familiarize himself completely with the ideals, needs, structure and operations of his college so that his discussions with outsiders will be exact, authoritative and constructive;
- 2) keep himself abreast of the latest developments in his particular area and seek to stay fresh and up-to-date in his approach;
- 3) exhibit those qualities of honesty, integrity, compassion and tolerance which are necessary to sustained success in any area;
- 4) be willing and able to speak authoritatively to civic and educational groups, not only on his own area of specialization, but on the college and higher education in general;
- 5) be a "self starter" and show initiative in carrying out his responsibilities;
- 6) last, but certainly not least, the development officer must understand the fundamental sales technique of how to "close." We must remember that we get money by asking for it and that in development, as

in business, nothing happens until a sale is made. I have seen many potentially good development officers flounder on this very important point. Do not be afraid or hesitant about looking the potential donor in the eye and asking him for a major gift. This is the payoff. If you don't feel you need the money, how can he? I have yet to see a person embarrassed by having asked for too much. No matter how just the cause and compelling the presentation, if you fail to "close," then all is for naught.

In addition to these qualities which I have listed, Harold J. Seymour, the elder statesman of fund-raising, lists three more which I would like to emphasize:

"Generally, development people should cultivate three key attributes."

"First, there is a kind of liveliness that generates and communicates enthusiasm, knows and likes people by instinct and preference, exhibits a genuine kind of pleasure and gratitude for good advice and wise talk, and bears proudly the mantle of the job."

"Then there is sensitivity--to people, to ideas, to environments--without which, in some adequate degree, failure in this or any field of personal service is almost certain."

"And the third value to be nurtured is perspective. Perspective means a lot of things to development officers, and all the things mean a lot. It means, for instance, that you never overlook the law of diminishing returns, that choices always have to be made between what is desirable and what is really necessary, and especially that the good laws and principles of organized fund raising are a priceless gift

of the long years, and can be ignored or trifled with at your peril."

"Perspective is important too in the area of personal advancement. For your role in this field is out in the wings and not stage center. Your joys must be vicarious, and you must learn that they can be all the sweeter thereby. Let me repeat what you should remember in your own self interest - that to seek credit is to lose it and that to disclaim credit is usually to win more than you probably deserve." Well said!

The foregoing qualifications assume that the development officer will become actively involved in the total life of the college. Only by being aflame with confidence and faith in the validity of the college and its ideals can both he and the college develop what David Riesman calls, "the nerve of failure," a term he defines as "the courage to accept the possibility of defeat, of failure, without being morally crushed."

Failure, the development officer must see as being particular and not general; as temporary, not permanent. Indeed, permanent failure he must view as unthinkable.

A negative but effective framework for the development officer's thinking is to constantly seek an answer to the question, "What would be lost if my college closed?" A serious answer to this question requires that he know the college in detail, for one cannot promote and defend that with which he is not familiar, or does not understand, or that in which he is not totally involved.

Henry Wriston, writing in Academic Procession, lists two basic

rules of college administration. First, he says college administrators must realize that they do not have a "product" but they exist to develop people. Secondly, and growing out of this basic truth, is the fact that the machinery through which a college achieves its ends is composed of people. Wriston further sharpens the nature of a college by stating that its "central objective is the cultivation of the mind." Development officers who accept this basic truth and can relate its significance to possible sources of support are priceless and will be around for a long time. Those who do not, however well-intentioned they might be, are doomed to failure. This is as it should be.